

**Georgia Department of Human Resources Division of Aging Services  
Requirements for Non-Medicaid Home and Community Based Services**

**Section 300                      Individual Service Requirements**

**§312 Chore Service Requirements**

**June 2002**

**§312.1 Purpose**

This chapter establishes the requirements to be followed when Area Agencies on Aging provide or contract for the provision of chore services to frail elderly people in and around their residences

**§312.2 Scope and Definitions.**

These requirements apply to services provided in whole or in part with non-Medicaid federal and state funds<sup>1</sup> managed by Area Agencies, and any associated matching funds. These requirements apply to chore services provided to eligible persons in their places of residence and/or in outdoor areas connected to the place of residence. Chore services are defined as those non-continuous household maintenance tasks intended to improve sanitation and safety of interior and/or exterior residential environments, resulting in the improvement and maintenance of the safety of individuals living in privately owned or rental residences.

**312.3 Service provider eligibility**

Area Agencies may provide directly or contract for the provision of chore services with private non-profit organizations or commercial businesses which have the capacity to perform the tasks necessary to improve residential environments and increase the safety and independence of frail community-dwelling elders.

**§312.4 Target groups.**

The target group for this service is frail older persons who live independently, but who are functionally impaired in their ability to perform regular activities of daily living, who have no one else in the household who is capable of performing the tasks or financially providing for them, and where no relative, caregiver, landlord, community/volunteer agency, or third party payor, is capable of or responsible for their provision.

**§312.5 Client eligibility.**

- (a) For the non-Medicaid Home and Community Based Services Program,<sup>2</sup> eligible individuals will meet the following criteria:
- (1) are age 60 and over, and
  - (2) have at least a moderate degree of physical and/or mental disability or disorder which restricts his/her ability to perform basic activities of daily living, or which threatens his/her capacity to live independently;

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<sup>1</sup> Eligible funds sources are the Older Americans Act, Title III-B, and Title III-E (supplemental services); the Social Service Block Grant; and the State Community Based Services Program.

<sup>2</sup> This program is defined as the services provided through Title III of the Older Americans Act, the Social Services Block Grant (SSBG), the State-Funded Alzheimer's Program, the Georgia Caregivers Resource Center (GCRC), and the

- (3) do not have sufficient access to persons willing and/or able to assist with or perform the activities of daily living to enable the individual to continue to live safely and independently.
- (b) Chore services also may be provided to persons participating in the Title III-E National Family Caregivers Support Program as a *supplemental* service, using the eligibility criteria for that program.
- (c) Chore services may be provided to persons residing in rental housing after a determination is made that the tasks to be performed are not the responsibility of a landlord, rental management company, or public housing authority, according to a valid lease agreement.

#### §312.6 Access to Services

Clients or their representatives may request services through the Area Agency, or may be referred to the Area Agency by other social service agencies, community organizations, businesses and/or health care providers. The Area Agency on Aging shall screen all applicants for service, using the DON-R to identify areas of functional impairment. Subject to the availability of services area agencies will initiate services, if providing directly or refer appropriate applicants to provider organizations, or place them on a waiting list for services. When available, services will be provided in the client's (or, if appropriate, caregiver's) place of residence. Service shall not be provided in a nursing home, personal care home or other institutional setting.

#### §312.7 Service Activities.

Chore service activities are planned with input from the client whenever possible, or a representative, based upon an assessment of his/her needs and the degree of physical and/or cognitive impairment of the care receiver. Service activities are one-time, seasonal or occasional in nature and include, but are not limited to:

- cleaning appliances, including cleaning ovens and defrosting and cleaning refrigerators;
- replacing fuses, light bulbs; repairing electric plugs, frayed cords;
- cleaning and securing carpets and rugs; cleaning and waxing wood or tile floors
- washing walls and windows;
- installing window shades, blinds, and curtain rods, hanging draperies;
- installing screens and installing and removing storm doors and windows;
- moving or rearranging furniture to provide safe entry, mobility, and egress;
- turning mattresses;
- cleaning closets and drawers;
- cleaning attics, basements, porches and outbuildings to remove fire and health hazards;
- cleaning of exterior surfaces, such as removing mildew from siding or decking;

- pest control, interior and exterior;
- grass cutting and leaf raking;
- clearing walkways of ice, snow and leaves;
- clearing interior and exterior debris following natural disasters;
- trimming overhanging tree branches;
- changing interior and exterior light bulbs;
- changing batteries in smoke, carbon monoxide detectors.

Service activities performed by chore service workers do not include any of the routine housekeeping and home management tasks performed by homemaker service agencies or hands-on personal care tasks performed by licensed providers of in-home services. Chore services also do not include activities that are more appropriately provided through a residential repair or home modification program.

**§312.8 Service outcomes.**

Service providers shall ensure that their services achieve the following outcomes.

- (a) Quality chore services are provided at reasonable cost.
- (b) Service planning and delivery reflects staff's awareness of and understanding of client's personal preferences for maintaining their homes and surroundings, balanced with need for intervention to improve their safety in and around their residences.
- (c) Services are designed to improve the safety of the client's interior and exterior environments.
- (d) Services provided are based on a plan individualized for each client's (and caregiver when present) needs, in the manner and times promised.
- (e) The provider is able to expand service capacity and improve quality with additional revenue generated through voluntary contributions and client cost share, when applicable.

**§312.9 Exemption from State Licensure**

Providers of chore services are not subject to licensure requirements for private home care providers under the Rules and Regulations of the State of Georgia. However, all commercial enterprises shall possess any business or operating licenses required by the municipalities or counties in which they operate.

**§312.10 Delivery characteristics.**

Service providers will deliver services in the following manner.

- (a) Assessment. Depending on the option exercised for conducting client assessment<sup>3</sup>, AAA staff, staff of a care management agency, or provider agency staff will determine those one-time, seasonal or occasional activities that are indicated to improve the client's safety and ability to remain in his/her residence. The assessment shall identify additional sources of support, which may be available from friends, family, neighbors, or volunteer groups or individuals.
- (b) Service plan.
  - (1) Designated staff shall begin developing the service plan, using a format provided or approved by DAS, with the client and/or family during the in-home assessment visit and document the final service plan prior to initiating services. The plan, at a minimum, shall include:
    - (A) information which clearly links the services to be provided with the functional impairments of the client, rendering him/her incapable of adequately maintaining the home and its surroundings in safe and sanitary condition.
    - (B) types of service required/tasks requested or indicated and tasks to be performed;
    - (C) the expected schedule of services, including times and frequency of visits to the client's residence, and the estimated duration of the need for service (one time only versus intermittent, but ongoing);
  - (2) If chore services are to be provided on an ongoing, intermittent basis, the service supervisor /case manager shall complete the service plan within seven working days after services initially are provided in the residence. Plans are to be revised as necessary, and reviewed and updated by staff members involved in serving the client.

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<sup>3</sup> In addition to using the DON-R to determine the client's functional impairment level, the assessor will use the "Home Safety Checklist" in CHAT, or complete a paper copy for the client file. The checklist content may be found in

- (c) Service initiation.
- (1) The provider agency has the discretion to begin providing basic services in the home prior to the completion of the initial service plan, in situations in which the provision of services will immediately improve the safety of the client's home and person.
  - (2) The agency shall initiate services within no more than ten working days from the date of receiving the referral, and thereafter deliver them on a regular basis in accordance with the established service plan. If exterior work, such as snow or debris removal, is planned, the work shall be completed as soon as conditions permit access to the property.
  - (3) The provider agency shall make a telephone or other contact within the first four weeks of service initiation to ensure caregiver and client satisfaction, and annually thereafter for the duration of the service relationship, if services are provided on a routine basis.
  - (4) Placement of chore service workers. Supervisors/manager shall assure that, prior to beginning to provide services, each chore service worker receives information about the client's household routine, including the preferred times for services to be scheduled and provided.
- (d) Supervisory/monitoring visits. If chore services are provided on an ongoing basis, the appropriate provider agency supervisory or management staff shall make visits to each client's residence, starting from the date of initial service in a residence to ensure that the client's (and/or caregiver's if present) needs are met. The visit shall include an assessment of the general condition of the residence, any problems noted, and the client's/caregiver's satisfaction with services. Supervisors also shall observe and note the appropriateness of the level of services being provided. If a AAA contracts with a commercial concern (that is, not a social service organization) for the provision of chore services, and no case management organization is overseeing service delivery, the AAA shall develop a mechanism by which it can obtain feedback from the chore service staff about any changes in the client's situation which would warrant additional service interventions.

- (e) Reassessment. Depending upon the options exercised by the Area Agency to conduct client assessments, designated Area Agency, case management, or provider agency staff shall reassess each client who receives chore service on an on-going or intermittent basis, at least annually, or more frequently, based on changes in the client's functional status or other conditions. Designated staff responsible for assessment activities shall conduct reassessments, either when contact with the caregiver and client indicates the caregiver's and/or client's needs have changed, or when staff providing services (or the caregiver) observe and report that needs have changed.
- (f) Service termination and discharge.
  - (1) The provider agency shall discontinue services:
    - (A) upon the death of the client or his/her entry into a personal care home or nursing home, or when there is no longer a need for the service.
    - (B) when the client (or caregiver) is non-compliant with the plan of care through persistent actions of the client or family which negates the services provided by the agency, but only after all attempts to counsel with the client/family have failed to produce a change in behavior leading to compliance.
    - (C) when the client (or others in the home) threatens the chore service care worker or other agency staff to the extent that the staff's welfare and safety are at risk and all attempts at corrective action have failed.
    - (D) when the provider agency resources are not adequate to meet the needs of the client.
    - (E) upon the request of the client or responsible party.
  - (3) The provider agency shall provide written notice of termination and discharge at least 21 calendar days prior to the date of discharge, when applicable.

- (4) During the 21-day period, if appropriate, the Area Agency and/or case management agency shall work with the provider to make arrangements with the client and/or family for transfer to another agency, institutional placement, or other appropriate care.
- (5) The provider shall continue to provide care in accordance with the service plan for the 21-day notice period or until alternate arrangements can be made, whichever occurs first, unless staff providing chore services are at immediate risk of harm.

**§312.11 Staffing.**

Providers of chore services shall have sufficient numbers of qualified staff to provide services specified in the service agreements with clients.

- (a) Qualifications. Staff who perform chore services shall:
  - (1) have a basic ability for oral and/or written communications, as appropriate for the chore service to be performed, as evidenced by the possession of a high school diploma, or GED, or demonstrated ability to follow oral instructions to complete assigned tasks.
  - (2) have no evidence of criminal conviction for any kind of offense which would have a direct bearing on the individual's fitness to provide chore services, as evidenced by the successful completion of a criminal history records check.
  - (3) have no infectious or contagious disease and be physically capable of performing the service, as evidenced by a physician's statement or other documentation such as self declaration of health history and status;
  - (4) practice confidentiality by agreeing to refrain from discussing any information pertaining to clients with anyone not directly involved with service delivery.
- (b) Specific competencies include:
  - (1) the ability to use tools and equipment necessary to complete minor home maintenance, for such tasks as snow removal, walkway maintenance, or painting;
  - (2) the ability to follow manufacturers' instructions for and use of basic household tools, appliances and equipment needed to complete maintenance or cleaning tasks, such as cleaning, carpet or floor care,

garbage removal, moving furniture for seasonal cleaning or safety reasons.

- (c) Providers shall assure that all persons who operate motorized pieces of equipment or motorized vehicles while performing chores services are properly trained in the use of the equipment/vehicle, and properly licensed, if applicable.

**§312.12 Orientation and training requirements.**

The provider agency shall provide services with personnel who meet the qualifications and competencies to perform requested and agreed upon services of the client or family.

- (a) Social service agencies and community organizations providing chore services are responsible for the following:
- (1) providing an orientation for personnel to their job responsibilities including, but not limited to:
- agency policies and procedures;
  - orientation to the philosophy and values of community integration and consumer-driven care;
  - recognizing changes in caregiver and clients' conditions indicating the need for emergency procedures or health services;
  - agency code of ethics and employee conduct;
  - client rights and responsibilities;
  - the agency's complaint handling process;
  - process for reporting client progress and problems to supervisory staff, including suspected cases of abuse, neglect or exploitation;
  - the employee's obligation to inform the employer of known exposure to tuberculosis and hepatitis, or any other communicable disease.
  - maintenance of documentation to demonstrate that an individual is able to perform the services for which s/he is responsible; and
- (2) assuring that the staff responsible for directing/ providing training are qualified to provide instruction.



- (b) The provider agency may provide the training directly or assist employees in locating and attending the appropriate training. Additional training shall be directed at improving the ability employees' to meet the needs of the caregiver, the client, and support accomplishment of service outcomes. Specific training content for chore service workers includes, but is not limited to:
  - (1) basic home safety and sanitation, including use of the home safety checklist;
  - (2) training in generally accepted methods and procedures for minor home maintenance,
  - (3) training in the use of basic tools, operation of equipment and use of supplies to complete specific chore tasks;
  - (4) training in generally-accepted procedures for housecleaning and yard maintenance.

**§312.13 Administrative requirements.**

- (a) The provider shall establish and implement written policies and procedures that define the scope of the chore services it offers and the type(s) of clients to be served.
- (b) Agencies shall maintain accurate administrative, fiscal, personnel, and client case records that shall be accessible and available to authorized representatives of the area agency on aging, the Division of Aging Services, the Department of Human Resources, and others as required by law.
- (c) Providers contracting with Area Agencies on Aging shall assure that all prospective employees are screened through the state criminal records investigation process.
- (d) Service agreements. No provider shall offer to contract for or provide a caregiver or client any chore service that it cannot reasonably expect to deliver.
  - (1) Each provider shall develop and implement policies and procedures for service agreements. All services provided to a client shall be based on a written service agreement entered into with the client. The agreement shall include:
    - (A) date of referral (date on which the provider received the specific referral from the AAA to provide chore services to a client and/or care giver);
    - (B) date the provider made initial contact with the client or caregiver for services;

- (C) description of services/activities needed, as stated by the client/caregiver;
  - (D) description of the services to be provided, staff to be assigned, and expected days, duration and frequency of services;
  - (E) agency charges for services rendered (if applicable), and whether the charges will be paid in full or in part by the client or family; methods of billing and payment;
  - (F) any special arrangements required for providing supplies, equipment,
  - (G) Information about the client's/family's opportunity to contribute voluntarily toward the cost of services;
  - (H) caregiver's/client's acknowledgement of receipt of "Client's Rights and Responsibilities" written notification.  
(See Appendix 312-B for listing of rights and responsibilities);
  - (I) a telephone number for the provider which the client/caregiver can call for information, to ask questions, or to file complaints about the services supplied by the provider and information regarding supervision by the agency of the services to be provided;
- (2) Providers shall complete service agreements for new clients before or at the time of the delivery of chore services, if services are one-time in nature; or, if provided on an intermittent, ongoing basis, not later than seven calendar days after services initially are provided in the residence. If unable to complete the service agreement for good cause, the provider will document the reasons in the client record. Subsequent revisions to the initial service agreement may be indicated by the provider noting in the client record the specific changes in service (e.g. addition, reduction or deletion of services; changes in duration, frequency or scheduling; changes in charges for service.) that will occur, documentation that changes were discussed with and agreed to by client/responsible party, who signed the initial agreement prior to the changes occurring

- (3) The client, or his/her representative, has the right to cancel any service agreement at any time and shall only be charged for actual services rendered prior to notifying the provider of cancellation. The provider may assess a reasonable charge for travel and staff time if notice of cancellation is not provided in time to cancel a previously scheduled home visit for service delivery.
- (e) The provider agency shall maintain personal and property liability coverage on all employees who are connected with the delivery and performance of chore services, and bonding of employees when applicable and appropriate.
- (f) The provider agency shall furnish adequate identification (ID) to employees who provide chore services or who have direct contact with clients/caregivers on an ongoing basis.
  - (1) Each employee shall carry the ID and either wear it on his/her person or present it to the client/caregiver upon request.
  - (2) An adequate ID is one that is made of permanent materials and which shows the provider agency name, the employee's name, title and photograph.
  - (3) The provider shall issue the ID at the time of employment and shall require the return of the ID from each employee upon termination of employment.
- (g) The provider agency shall ensure that no chore service worker is a member of the immediate family of the client/caregiver being served by that worker.
- (h) Each provider agency shall establish and enforce a code of ethics and employee conduct which is distributed to all employees and clients/families. The code shall provide for workers' use of bathroom facilities, and with the client's consent, allow workers to eat lunch or snacks, provided by the workers, in the client's home or surrounding areas. The code of ethics shall include, at a minimum, prohibitions regarding:
  - (1) Consumption of clients' food or drink, except for water.
  - (2) Use of clients' telephones for personal calls.
  - (3) Discussion of one's own or others' personal problems, religious or political beliefs with the client.

- (4) Bringing other persons, including children, not involved in providing services to the clients' homes.
  - (5) Solicitation or acceptance of tips, gifts or loans in the form of money or goods for personal gain from clients/caregivers.
  - (6) Consumption of alcoholic beverages, or use of medicines or drugs for any purpose, other than as prescribed for medical treatment, in the clients' homes or prior to being present in the home to provide services.
  - (7) Smoking in clients' homes.
  - (8) Breach of the clients'/caregivers' privacy or confidentiality of information and records.
  - (9) Purchase of any item from the client/caregiver, even at fair market value.
  - (10) Taking anything from the client's home.
  - (11) Committing any act of abuse, neglect or exploitation.
- (i) Record keeping.
- (1) Client records. Providers shall maintain separate files, in a manner specified or approved by the Division, containing all written records pertaining to the services provided for each client served, including, at a minimum, the following:
    - (A) Assessment and reassessment documentation, gathered through the use of instruments or inventories specified or approved by the Division of Aging Services ;
    - (B) Identifying information including the name, address, telephone number of the client/responsible party, if applicable;
    - (C) Current service agreement;
    - (D) Current service plan;
    - (E) Documentation of tasks performed by chore care staff.
    - (F) Documentation of findings of home supervisory visits, unless reflected in the service plan.

- (G) Any material reports from or about the client that relate to the services being provided, including items such as progress notes and problems reported by employees of the provider agency; communications with family members or responsible parties, and any other pertinent information.
  - (H) The date of the referral.
  - (I) Any and all additional information requested or required by the Division.
- (2) Retention and confidentiality of client records.
  - (A) Providers shall establish and implement written policies and procedures for the maintenance and security of client records, specifying who shall supervise the maintenance of records; who shall have custody of records; to whom records may be released and for what purposes.
  - (B) At a minimum, providers shall retain client records for five years from the date of the last service provided.
  - (C) Providers shall maintain the confidentiality of client records. Employees of the provider shall not disclose or knowingly permit the disclosure of any information in a client record except to other appropriate provider staff; staff of other service provider agencies, on a need to know basis, including case managers from case management agencies who are coordinating all services for clients; the client; the responsible party (if applicable); the client's physician or other health care provider; the Department of Human Resources; the Division of Aging Services; other individuals authorized by the client in writing, or by subpoena.

- (3) Personnel records. Providers shall maintain separate written records for each employee, including the following:
  - (A) Identifying information: name, address, telephone number, emergency contact person(s);
  - (B) Employment history for previous five years or complete history if the person has not been employed for five years;
  - (C) Documentation of qualifications;
  - (D) Date of employment;
  - (E) Individual job descriptions or statements of persons' duties and responsibilities;
  - (F) Documentation of completion of orientation and training requirements.
  - (G) Documentation of an annual performance evaluation, at a minimum.
- (4) Reports of complaints and incidents. Providers shall maintain:
  - (A) files of documentation of all complaints regarding the chore services provided;
  - (B) all incident reports or reports of unusual occurrences (falls, accidents, etc.) that affect the health, safety and welfare of the chore service workers or clients, for a minimum of five years;
  - (C) documentation of action taken by the provider to resolve clients' complaints and to address any incident reports or unusual occurrences.

**§312.14 Mandatory reporting of suspected abuse, neglect or exploitation.**

All staff of chore service provider agencies involved in the provision of services in clients' homes, or supervision of chore service workers, are mandated reporters according to state law<sup>4</sup> and shall be familiar with and be able to recognize situations of possible abuse, neglect or exploitation or likelihood of serious physical harm to persons receiving services. Staff are responsible for following

agency procedures for reporting suspected abuse, neglect or exploitation to the appropriate law enforcement agency, prosecuting attorney, or county department of family and children services. The provider agency shall develop procedures for chore assistants to communicate such situations for reporting through appropriate supervisory channels.

**§312.15 Service Availability.**

Providers of chore services shall assess the needs of consumers in the communities in which services are provided to determine the extent to which consumers need services outside of regular business hours, on weekends and on holidays, and incorporate into business plans strategies to expand capacity to meet those needs. Providers may establish differential unit costs for services provided outside of core agency hours, if the provision of such service actually results in an increased cost to the agency.

**§312.16 Provider Quality Assurance and Program Evaluation.**

- (a) The Area Agency on Aging will assist each provider of chore services in evaluating the effectiveness of the program, at least annually.
- (b) The process shall include, but not be limited to:
  - (1) a review of the existing program's operations.
  - (2) satisfaction survey results from participants and their families (when involved), and job satisfaction survey results from staff.
  - (3) an assessment of achievement of client outcomes;
  - (4) program modifications made that responded to changing needs of participants and staff.
  - (5) proposed program and administrative improvements.
- (c) If the organization also provides other in-home services through a AAA contract, it shall include the chore service evaluation in the annual report for the other services<sup>5</sup> and submit to the Area Agency on Aging a written report which summarizes evaluation findings, improvement goals and implementation plan. The report shall be submitted no later than the end of the first quarter of the new fiscal year (September 30.)

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<sup>5</sup> Providers of homemaker, personal care and in-home respite are responsible for submitting an annual report to the Area

- (d) If the AAA contracts with a commercial concern for the provision of chore services, the AAA shall use client satisfaction feedback, and any other relevant information regarding the acceptability of service delivery to evaluate and provide feedback regarding the contractor's performance at least annually.

**§312.17 Fiscal Management.**

Contractors providing chore services shall practice sound and effective fiscal planning and management, financial and administrative record keeping and reporting. Contractors will use the Division's Uniform Cost Methodology on an annual basis to analyze, evaluate and manage the costs of the program.

**§312.18 Quality Assurance and Compliance Monitoring**

The Area Agency on Aging and the Division of Aging Services periodically will monitor and evaluate chore service program performance to determine the degree to which defined program outcomes and objectives, and individual client outcomes, have been or are being accomplished. The Area Agency shall monitor for compliance with these requirements and evaluate contract agency performance on at least an annual basis. The AAA shall provide written feedback to contractors on the findings, and technical assistance for continuous quality improvement. The AAA will take into account the findings of the contractor's self-evaluation.

**Effective Date:**

Upon Issuance. AAAs shall assure that providers subject to these requirements receive a copy of this chapter in a timely manner and shall allow providers a reasonable period of time to make adjustments for compliance.



**Appendix 312-A**  
**The Home Safety Checklist**

### The Home Safety Checklist

	Yes	No	Comments
<b>ENTRANCE:</b>			
· Can you enter the house or apartment safely?			
· Is a secure railing present?			
· Can you view visitors prior to entry?			
· Are locks in working order?			
<b>LIVING AREAS:</b>			
· Is the doorway accessible?			
· Is there an uncluttered walking pathway?			
· Can you get up and down safely from the sofa and chair?			
· Can you open and close the windows?			
· Can you manage the television?			
· Can you manipulate the light switches?			
· Are cords out from beneath carpeting and furniture?			
<b>KITCHEN:</b>			
· Is the doorway accessible?			
· Are the appliances in working order?			
· Can you manipulate the faucets of the sink?			
· Can you open and close the refrigerator and freezer?			
· Can you open and close high and low cabinets?			
· Is adequate workspace available?			
· Can you reach the dishes, pots, silverware, and food supply?			
· Can you reach the stove controls?			
· Can you manage the stove door?			
· Can you reach the outlets?			
· Can you safely transport food to eating area?			
· Are sharp objects stored safely?			
· Are flammables kept away from the stove area?			
· Do you have a step stool which is stable and in good repair?			
<b>BEDROOM:</b>			
· Is the doorway accessible?			
· Can you get up and down safely from the bed?			
· Is the light accessible from bed?			
· Can you reach the phone?			
· Can you reach your clothes in the closet and dresser?			
· Is there a clear path to the bathroom?			
<b>BATHROOM:</b>			
· Is the doorway accessible?			
· Can you safely transfer into the tub or shower?			
· Will a tub bench or tub chair be needed?			
· Is a bath mat or are non-skid strips in place?			
· Can you safely transfer to the toilet?			
· Will a safety frame, raised seat or grab bar be needed?			
· Can you reach the outlets?			
· Can you manipulate the light switches?			
· Can you functionally use the sink?			
· Is the toilet functioning properly?			
<b>STAIRWAYS:</b>			
· Is a secure handrail present?			
· Is there adequate illumination?			
· Is the carpet secure?			
· Are the steps free of clutter?			

**GENERAL:**

Yes      No      Comment

- . Are there working smoke detectors on every floor?
- . Do you have a carbon monoxide detector?
- . Are electrical cords free of frays?
- . Are there any outlets or switches which are unusually warm or hot to touch?
- . Is there adequate illumination throughout the house?
- . Are small rugs and runners slip-resistant?
- . Is the house free of pests?
- . Are the plumbing and utilities working?
- . Are you able to retrieve the mail safely?
- . Are emergency phone numbers posted on or near the telephone?
- . Do you have access to a telephone if you fall?
- . Are all medicines stored in the containers that they came in and are they clearly marked?

**LAWN and HOME EXTERIOR.**

- . Are the lawn and surrounding areas adequately maintained?
- . Are any walkways or sidewalks passable?
- . Is there debris, trash or materials needing removal or disposal?
- . Is the area surrounding the residence area free of vermin or pests?
- . Are repairs needed to windows, storm windows, or doors?
- . Are repairs needed to exterior steps or porches?

**OTHER:**

List any other repairs or maintenance needed.

Note: Chore service workers will not perform all tasks identified as necessary through the Checklist. Some tasks will require construction or other semi-skilled or skilled labor and would be provided either by licensed contractors or providers of home modification and repair services. Information regarding these needs should be referred to supervisory or case management staff for development of appropriate resources or communication with the AAA for referral to other community resources.

**Appendix 312-B**  
**Clients' Rights and Responsibilities**  
**Complaint Resolution**

**Rights and Responsibilities:**

Providers of chore services shall establish and implement written policies and procedures outlining the rights and responsibilities of clients. Client rights and responsibilities include:

1. The right to be informed about the plan of service and to participate in the planning process.
2. The right to be promptly and fully informed of any changes in the plan of service.
3. The right to accept or refuse service.
4. The right to be fully informed of the charges for service, if applicable.
5. The right to be informed of the name, business telephone number and business address of the person supervising the services and how to contact that person.
6. The right to be informed of the complaint procedures; the right to submit complaints without fear of reprisal; and the right to have complaints investigated within a reasonable period of time. The complaint procedure shall include the name, business address, and telephone number of the person designated by the provider to handle complaints and questions.
7. The right of confidentiality of client records.
8. The right to have one's property and residence treated with respect.
10. The responsibility of the client, and any responsible party, to advise the provider of any changes in the client's condition, or any events which affect the client's/caregiver's service needs.

**Complaint resolution:**

Providers shall describe in writing the manner in which complaints are to be addressed and resolved. Policies shall include procedures for clients and others to present complaints about services, either orally or in writing. Procedures also shall indicate that complaints will be addressed and resolved in a timely manner. The provider shall supply all clients and responsible parties with the specific telephone number of the provider, for information, questions or complaints about services being delivered.

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